What's New for the field in T-PAX Version 6.10

Contents:

What's New for the field in T-PAX Version 6.10

Attaching Electronic Files (T-PAX Imaging Function)

Introduction   The T-PAX Imaging Function provides travelers with the ability to attach scans (or other electronic files) of receipts, orders and amendments to their travel request, authorization, claim/settlement or request for advance.
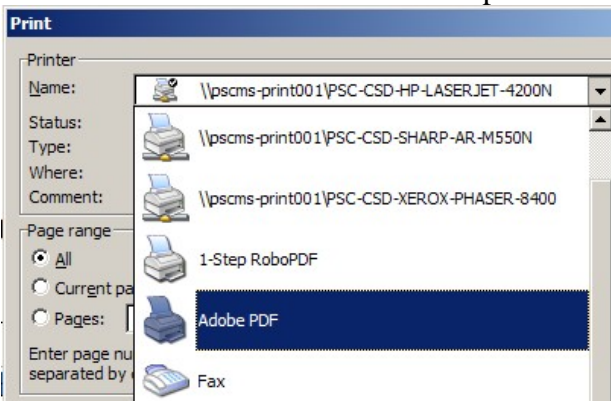
Before you begin   All documents MUST first be in an Adobe Acrobat PDF file. There are several ways to create a PDF file using *Adobe Acrobat 7 Standard*, which is included in the Coast Guard Standard Workstation software package. Two of the most common methods are discussed in the following sections:

1. Print to PDF
2. Create PDF from file

Print to PDF   If the document is already in electronic format, but not an Adobe Acrobat PDF file (e. g. an image (.jpg, .gif, .tif, etc.), a web page, an email message, or MS Office file) you can '*print*' the file directly to Adobe Acrobat.
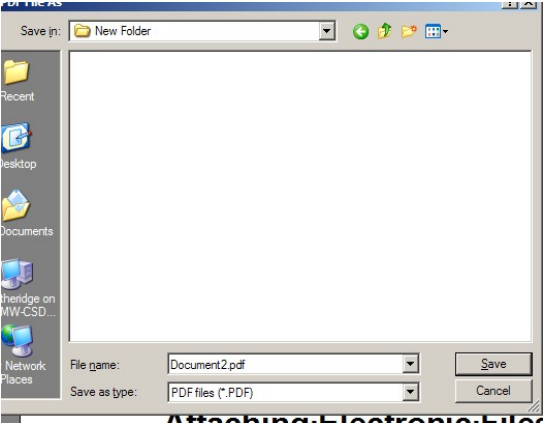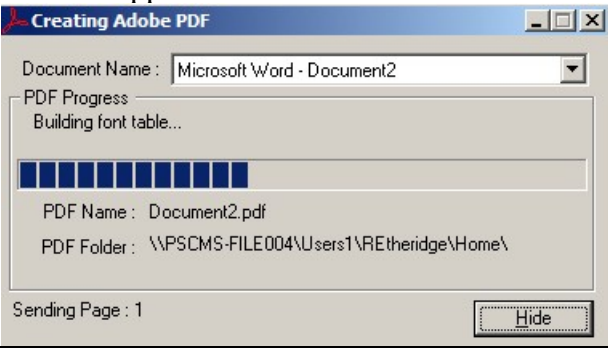
Step	Action
1	Open the file and select **File	Print** from the application's menu.
2	Select "**Adobe PDF**" from the list of printers

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Attaching Electronic Files (T-PAX Imaging Function), Continued

Print to PDF **(continued)**

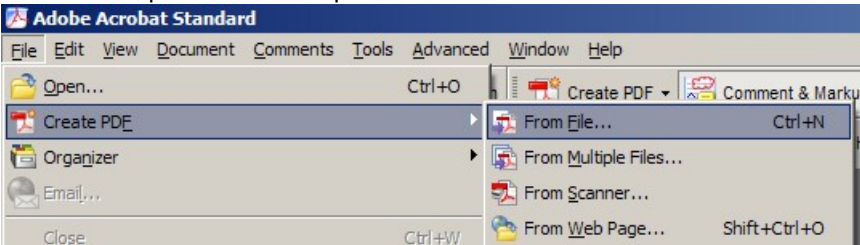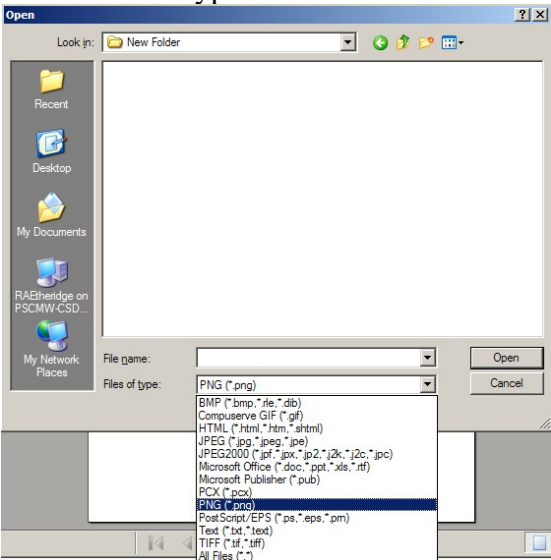| Step	Action
3	Name the file and select a location to save it to.
4	Click the "**Save**" button. The "*Creating Adobe PDF*" information box will appear.
5	After the process is complete, the PDF file will open in Adobe Acrobat.

Create PDF from a file   If the document is already in electronic format, but not an Adobe Acrobat PDF file (e. g. an image (.jpg, .gif, .tif, etc.), you can convert it to PDF file format using Adobe Acrobat's *Create PDF* menu.

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Attaching Electronic Files (T-PAX Imaging Function), Continued

Create PDF from a file (cont'd)
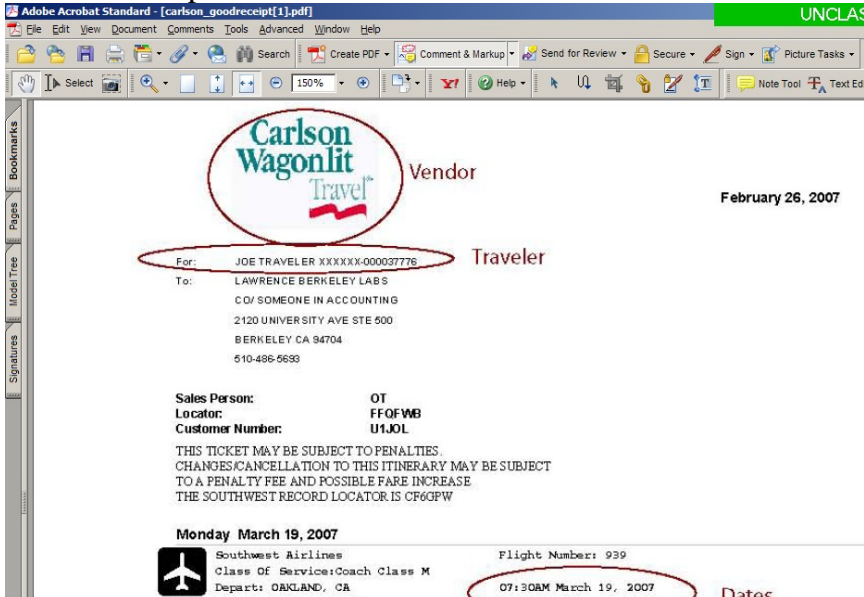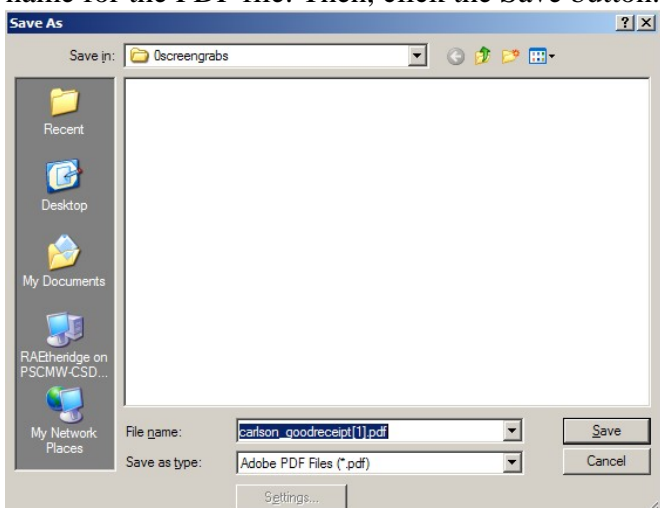
Step	Action
1	Start Adobe Acrobat (Start Menu | Programs | Adobe Acrobat 7 Standard)
2	Select **File | Create PDF | From File** from the menu. *(Note that you can also create a PDF directly from a scanner if you have one attached to your workstation)*
3	Select the file type and location
4	Click the **Open** button.

Attaching Electronic Files (T-PAX Imaging Function), Continued

Create PDF from a file (cont'd) **(continued)**

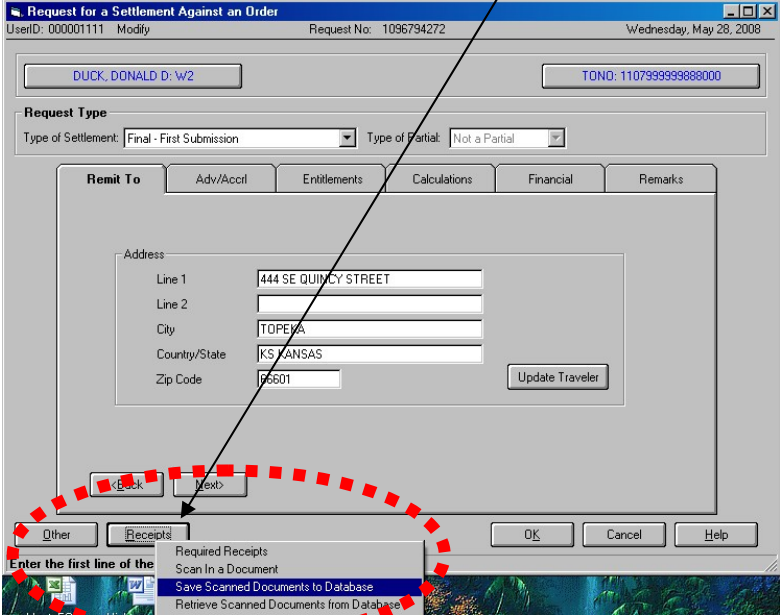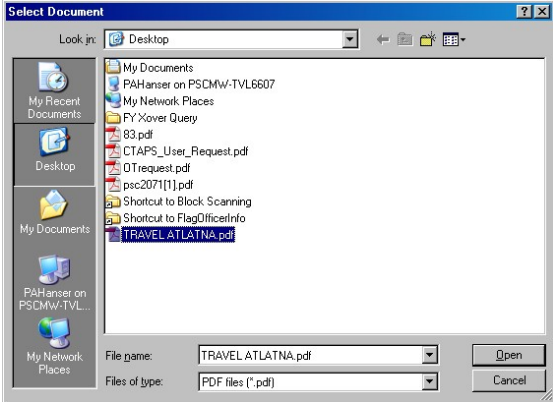| Step	Action
5	The file will open in Adobe Acrobat
6	Click the Save icon -- ⊟, select a location and, if desired, a new name for the PDF file. Then, click the Save button.

What's New for the field in T-PAX Version 6.10

Attaching Electronic Files (T-PAX Imaging Function), Continued

Attaching files in T-PAX

Now that you have your receipts and other supporting documentation in the correct format and saved to a location that is accessible from the workstation you are logged onto, you can attach them to your claim in T-PAX.
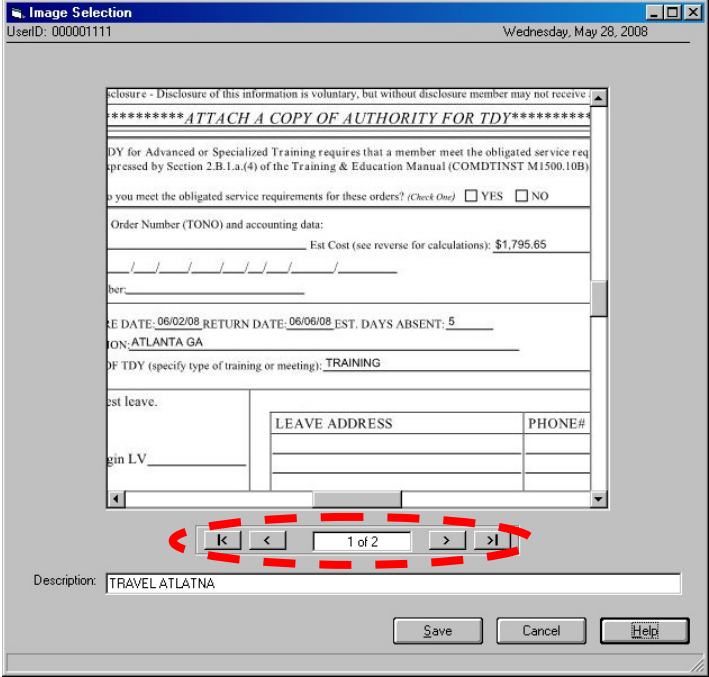
Step	Action
1	After completing a settlement – click the "**Receipts**" button then, select "**Save Scanned Documents to Database**" from the menu.
2	Locate and select the PDF file and click the "**Open**" button.

Attaching Electronic Files (T-PAX Imaging Function), Continued

Attaching files in T-PAX **(continued)**

Step	Action
3	Verify the document and the number of pages on Image Selection Screen and click "**Save**". This has now attached the PDF file to the claim number in the database. Repeat this procedure for each attachment.

Attaching Electronic Files (T-PAX Imaging Function), Continued

Viewing /Managing attachments

To View Documents that have been attached to a travel claim/advance/authorization, Click the "**Receipts**" button and then click **Retrieve Scanned Documents from Database**.

Attaching Electronic Files (T-PAX Imaging Function), Continued

Viewing /Managing attachments (cont'd)

Each document saved will be shown by thumbnails. Click on the document to be viewed and then click **View**. This will bring up the Image Selection screen again. You may view this document by scrolling or by printing.
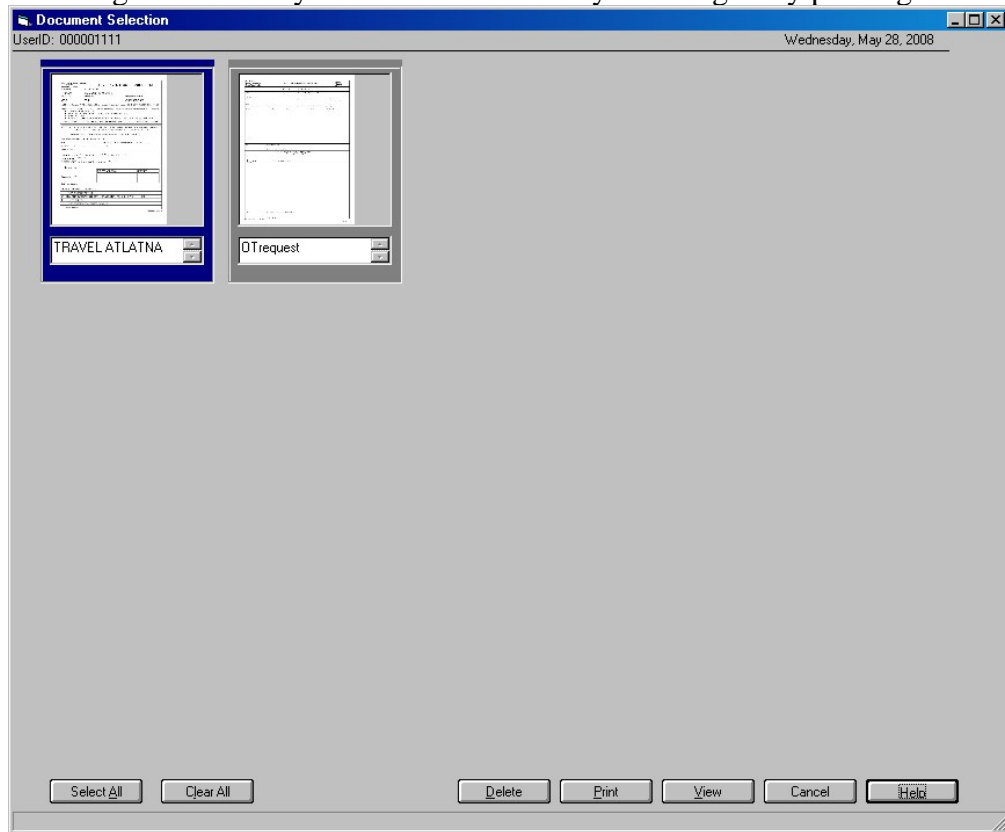

Click the "**Delete**" button to remove an attachment.

What's New for the field in T-PAX Version 6.10

Self-Service Password Reset

Primary and Secondary Passwords are reset

T-PAX now has two system generated passwords that goes to user's primary email account that is listed in T-PAX when user clicks on Forgotten password button. One for the logon password and one for the secondary/confirmation password.
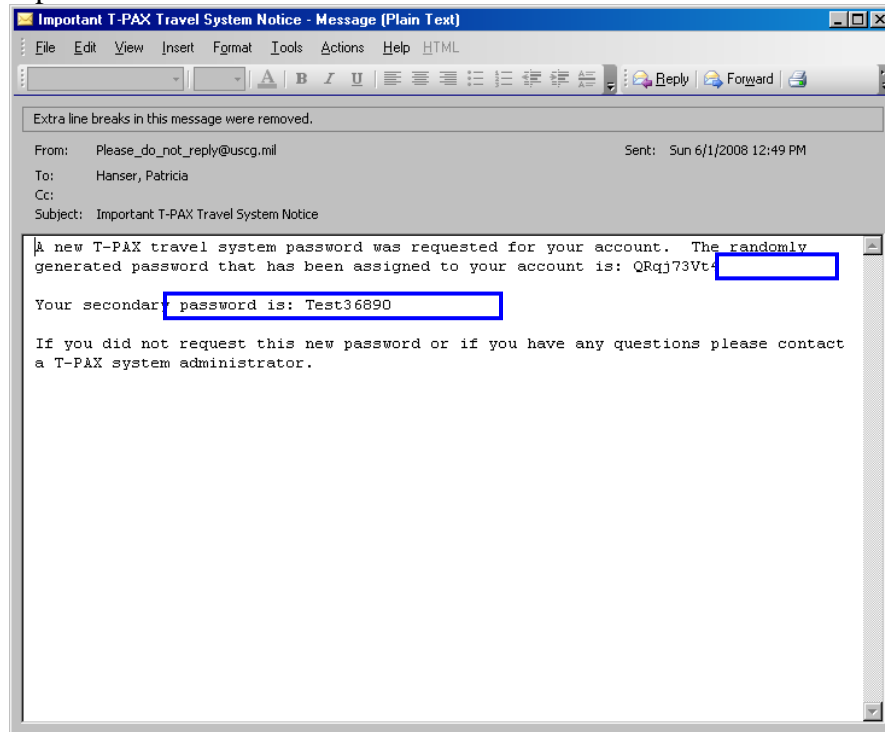
Reset/Change Passwords

Due to security issues, users may no longer change their T-PAX passwords in their profile on the T-PAX Information tab. These fields have been disabled. To reset/change T-PAX passwords, please click the Tools menu and then Change Passwords. You will be required to enter in the "Old Password" prior to resetting/changing. If you have used the above "forgotten password" button, please type the system random generated password into the "Old Password" field.

What's New for the field in T-PAX Version 6.10

Self-Service Password Reset, Continued

What's New for the field in T-PAX Version 6.10

Orders

What's Authorized Tabs

These tabs have been expanded and updated to provide accurate orders. All authorized entitlements marked on these two tabs will print on the orders as well as what is input on the Remarks tab. Should extensive entitlements be used, a "page 2" of the printed orders will be created.

What's New for the field in T-PAX Version 6.10

Printing Travel Voucher Summaries (TVS)

Print TVS from order history Users may now print a TVS from the Travel Order History screen by highlighting the TONO and settlement and clicking the print button at the bottom of the screen and then selecting Print Voucher.

What's New for the field in T-PAX Version 6.10

Advance Signature Proxy (ASP)

Introduction   Advance Signature Proxy (ASP) – This function is for SPO's. This permission/designation is granted after the completion of a new form CG PSC-7421 (http://www.uscg.mil/hq/cg1/psc/forms/psc7421.pdf)

Procedure   Follow these steps to request a travel advance as an ASP.

Step	Action
1	Sign into T-PAX and change your view by selecting "*Log in as Proxy*" from the menu bar.
2	Click **Fill Out and Click Request for Advance**. Note: Although other options appear, they are not available as an Advance Signature Proxy.
3	Type the traveler's name that the advance is to be completed for and click OK.

Advance Signature Proxy (ASP), Continued

Procedure **(continued)**

Step	Action
4	Type a new TONO or select an existing TONO and click **OK**.

Continued on next page

Advance Signature Proxy (ASP), Continued

Procedure **(continued)**

Step	Action
5	Click the **Entitlements** Tab and click in the **Pre-computed** box.
6	Enter the dates for the advance in the **From Date** and **To Date** fields.
7	Enter the **advance amount** into the **Entitlement Amount** field. Note – You cannot input amount larger than value of entitlement.

Continued on next page

Advance Signature Proxy (ASP), Continued

Procedure **(continued)**
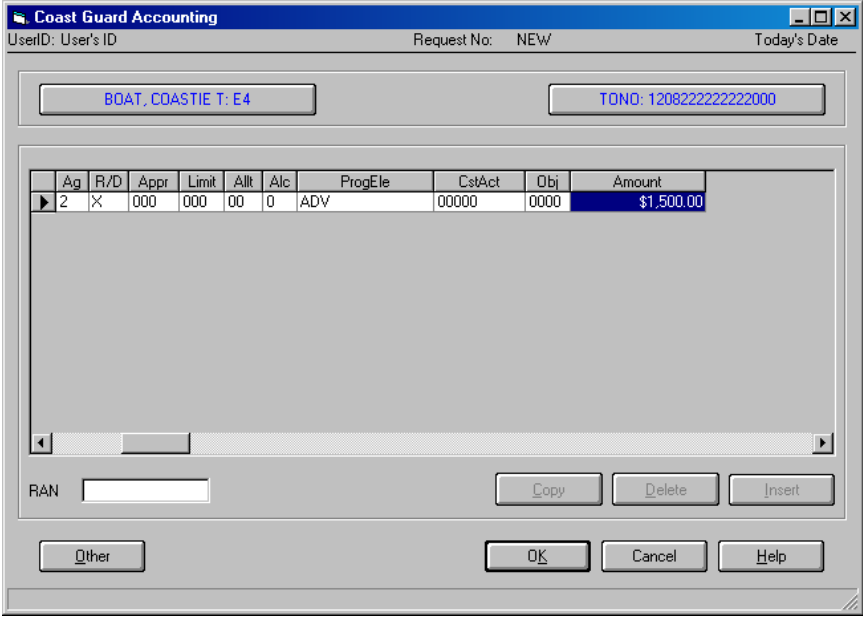
Step	Action
8	Click the **Financial Tab** and then click the **Modify Accounting** button

What's New for the field in T-PAX Version 6.10

Advance Signature Proxy (ASP), Continued

Procedure (**continued**)
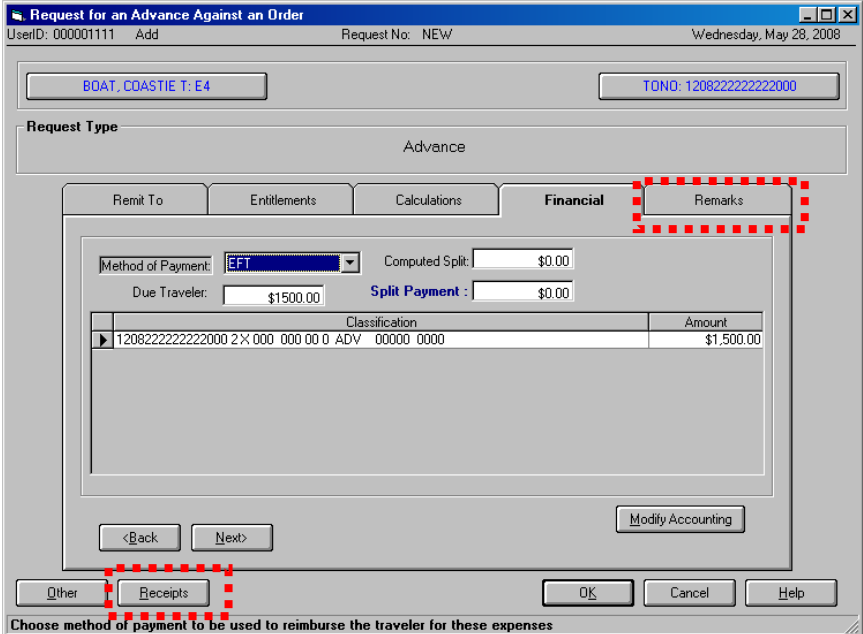
Step	Action
9	On the **Coast Guard Accounting** screen click **OK** Note: **DO NOT** change this line of accounting…this is a default used for advances.

What's New for the field in T-PAX Version 6.10

Advance Signature Proxy (ASP), Continued

Procedure **(continued)**

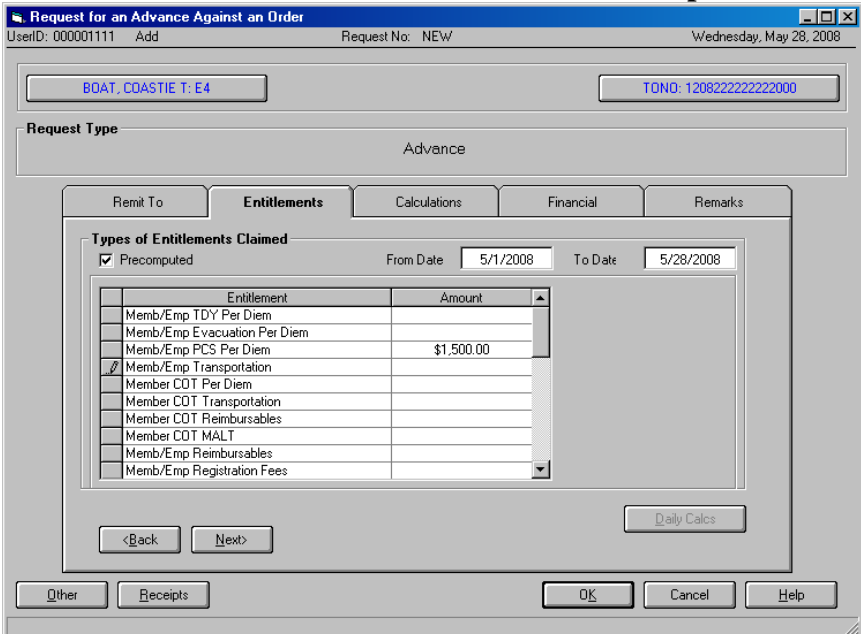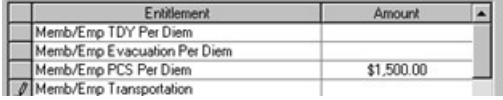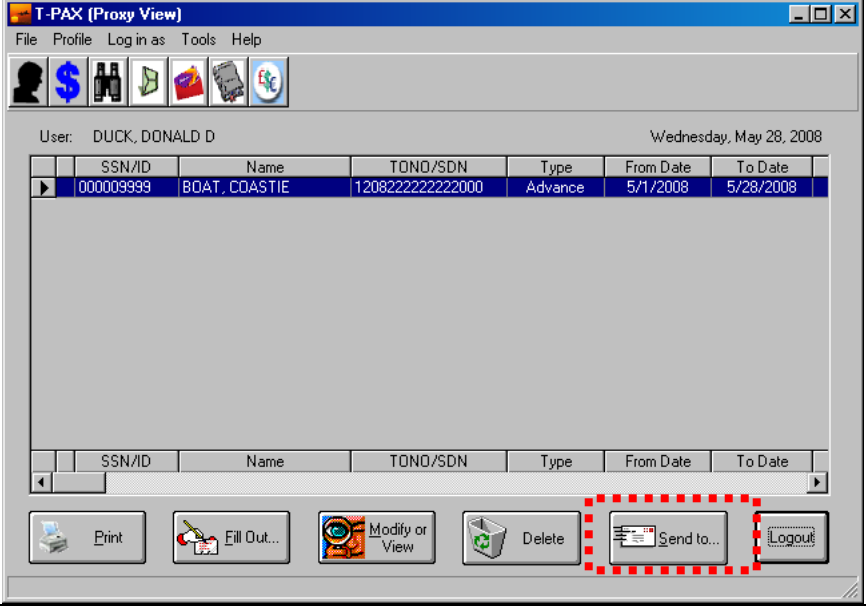| Step	Action
10	Enter remarks if required and use the Imaging Function (by clicking the **Receipts** button) to attach **SIGNED** Orders. **If orders are not attached, Advance will be returned!**
11	When complete, click the **OK** button on the **Request for Advance against an Order** screen.

Advance Signature Proxy (ASP), Continued

Procedure **(continued)**

Step	Action
12	Click the **Send to** button – this will give the opportunity to send to either the traveler or AO
13	Once submitted to the AO, follow same procedures as approving a settlement.
14	ALL advances will be screened by PSC (tvl).

What's New for the field in T-PAX Version 6.10

Proxy Expiration Date

Set date on profile tab

When a T-PAX user elects to assign a "Full Signature Proxy" an expiration date is recommended to be placed in the Signature Proxy Expire field. It is recommended a one year designation period be assigned.

What's New for the field in T-PAX Version 6.10

Travel Limited to Cost of Constructed Travel

Entering Cost of a GTR

When this transportation Mode is selected on the What's Authorized screen of the settlement, users will see a new screen appear.

    a. On the Constructed Itinerary, users must enter the Mem GTR costs for each leg of the trip. Please reference travel regulations to calculate this cost.

    b. T-PAX will then pay the lesser of the two costs – actual expense as input in the Itinerary or the Constructed Cost input on the Constructed Itinerary.

    c. DO NOT put the Cost of the GTR in the reimbursable screen or user will be overpaid.

    d. On the Entitlement page, click the Cons. Comp button and the screen will show you what T-PAX is going to reimburse for each leg, either the Actual cost of the Constructive cost.

What's New for the field in T-PAX Version 6.10

Travel Limited to Cost of Constructed Travel, Continued

What's New for the field in T-PAX Version 6.10

Validate/Verify Email Addresses

Email Address entry

It is important that all Email addresses are kept current in T-PAX. To ensure email addresses are correct, T-PAX will now require a validation entry when the email address is entered or changed.

```
┌─ Email Addresses for Correspondence ──────────────────┐
│                                                        │
│  ☑ Primary Email Address      Patricia.A.Hanser@uscg.mil │
│                                                        │
│  Verify Primary Email Address: [                    ]  │
│                                                        │
└────────────────────────────────────────────────────────┘
```

What's New for the field in T-PAX Version 6.10

Locked Accounts

Locked Accounts

Locked T-PAX Accounts -

    e. A T-PAX account may be locked by the system administrator for a few reasons. Examples include:
- i. Separated employee
- ii. Non USCG person without T-PAX Profile Creation Form

    f. Should you get the below error message, please contact PSC Customer Care for assistance.

T-PAX

⚠ This user account has been locked. Please see a system administrator.

[OK]
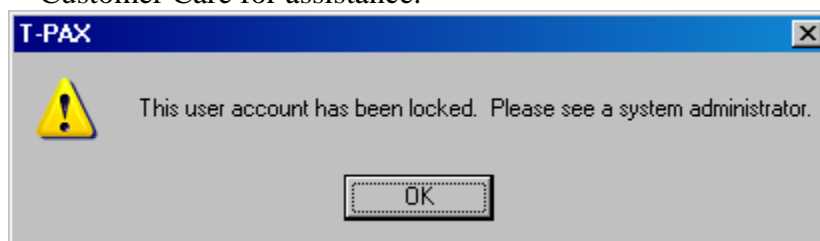
What's New for the field in T-PAX Version 6.10

New User Access/Proxy/AO Designation Form

New Form to be in use soon

CG PSC 7421 (2008 Revision) – Mentioned above was the new T-PAX/WinIats User Access Authorization & Approving Official (AO) Designation Form. **This form is currently in the "DRAFT" stage**. Once final approval is given, this form will be made available to the field via the PSC Travel web page. This form will supersede previous versions.

Department of Homeland Security U. S. Coast Guard CG PSC 7421 (Rev. 05/08)	Tpax/Winlats User Access Authorization & Approving Official (AO) Designation		
1. User's Name (Last, First, MI.) (Please print)		2. Rank/Rate:	3. Employee ID # (**Not SSN**)
4. Official Duty Station & **OPFAC**	5. Area Code & Work Phone Number:		6. e-Mail address:

7. User Role Description (see instructions)(Include current roles, this authorization supercedes all of your previous authorizations):

TPAX (Travel Preparation & Examination System Permissions)

☐ *Create "Non-CG Employee" Self Service User Profile*
☐ TPAX AO (Authorizing Official) Permissions
   ☐ Date of Expiration:_____
☐ Advance Signature Proxy Permissions
   ☐ Date of Expiration:_____
☐ Customer Service Representative Permissions (PSC Only)
   ☐ Date of Expiration:_____
☐ System Administrator (PSC TVL Only)
   ☐ Date of Expiration:_____

Winlats Access Permissions (PSC TVL Only)

☐ Examiner Permissions
☐ Auditor Permissions
☐ Distribution Permissions
☐ System Administrative Restricted Permissions
☐ System Admin Permissions (full)
☐ Super User Permissions (system suppt users only)

Web/Image Now Access Permissions (PSC TVL Only)

☐ Examiner Permissions (all travel folders) Exception:_____
☐ System Admin Permissions (all travel folders)
(JUMPS and Direct Access are separate permission forms that must be filled out separately.)

Scope of Authorization

Subject to the limitations that follow, the user is authorized access to the computer systems identified above. This authorization contains no implied authorization to access any other computer system of the United States Government not specifically identified herein. Authorization will be revoked upon separation, retirement, reassignment of duties, change of organization or when determined by the Information Systems Security Officer to be in the best interest of the Government.

WARNING: Only Authorized Users May Use These Systems.

To protect these systems from unauthorized use and to ensure that these systems are functioning properly, system administrators monitor these systems.

Individuals using these systems without authority, or in excess of their authority, are subject to having all of their activities on these systems monitored and recorded by system personnel. In the course of monitoring individuals improperly using these systems, or in the course of system maintenance, the activities of authorized users may also be monitored.

Anyone using these systems expressly consents to such monitoring and is advised that if such monitoring reveals possible evidence of criminal activity, management may authorize system personnel to provide the evidence of such monitoring to law enforcement officials.

8. **Cmd Designation** *(Signature &printed name, Rank, Title (CO/OIC, XO/XPO or HQ/CGPC/AREA/MLC/DIST Branch Chief) & Phone Number):*
I certify that the access I have authorized is based on an official need. I'm aware of the general functionality I have authorized and I'm aware of what this will allow this member to complete. This member has demonstrated that they are knowledgeable in the use of the program I've authorized and has my confidence that they will diligently make entries and if in doubt they will seek assistance. I also acknowledge that if I lose confidence in this member for any reason I have a responsibility to withdraw this authorization.

9 Date: